

Connect.

International Facility Management Association Advance.™ **Empowering Facility Professionals Worldwide**

> **2013 House of Delegates Annual Meeting** October 1, 2013 Philadelphia, Pa. USA



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Call to Order: 2013 IFMA House of Delegates Annual Meeting

And A MARA

Jon Seller Chair



Welcome and Opening Comments

Jon Seller Chair



Minutes of the 2012 House of Delegates Annual Meeting

And A MARA

Linda Pate Corporate Secretary



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2012-2013 Fiscal Year Financial Report

And A M JEA

Michael D. Feldman, FMP, CM Second Vice Chair

Financial Report

- Balanced Score Card Accomplishments
 - FMP Redevelopment
 - CFM Redevelopment
 - SFP Development and Launch
 - Essentials of FM Development and Launch
 - Service Center of Excellence Relocation Strategy
 - Technology infrastructure to support service and strategy
 - Total Investment last 3 years over \$3.5M



Finance Report

- Financial Impact
 - All items have been paid for over the last 3 years
 - Cash Flow continues to be positive
- Accounting Impact
 - Depreciation and Amortization Causing Deficits
 - FY 13 Approx. \$500K
 - FY 14 Approx. \$1.2M
 - Will continue into FY 15
- Total Investments remain over \$4M



Unaudited Results 2012 – 2013 Fiscal Year

• Total Revenue of \$12, 663,107

• Direct expenses of \$5,273,265

• Indirect operational expenses of \$7,833,925

• Operating Deficit of \$444,083



Cash and Reserve Funds 2012 – 2013 Fiscal Year

• Cash and cash equivalents of \$208,140

- Investment portfolio value \$3,994,951
 - Includes net gain of \$346,987
 - Includes the withdrawal of \$1.5M to fund the CFM exam revision and relocation



Annual Audit

- Year ending June 30, 2013
- Audit firm Briggs and Veselka
- Audit Committee meets with auditors in October 2013
- Approval by the IFMA Board of Directors follows at the end of October 2013

Operating Budget 2013 – 2014 Fiscal Year

- Gross revenues of \$13,961,527
- Direct expenses of \$9,097,175
- Indirect operational expenses of \$5,348,079
- Operating deficit of (\$483,727)

Investment in IFMA products, technology and relocation over the past 3 years causing deficit



Budget Summary 2013 - 2014 Fiscal Year

- Membership value proposition
- Membership campaigns
- Rebranding
- Knowledge Management
- Research
- Relationship Management



Motion for Approval of Financial Report?



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Thank you



IFMA Foundation Report

And A MARK

Diane Coles-Levine IFMA Foundation First Vice Chair

Mission

Position Facility Management as a CAREER OF CHOICE by promoting and supporting educational opportunities, related scholarships and research initiatives worldwide

* a 501(c)(3) charitable non-profit organization



on.....

We Foster FM Workforce Development

by collaborating with higher education institutions Worldwide

FM degree programs FM student scholarships FM research





Some Interesting Numbers

100 %

Average age of IFMA Member

Number of years until most retire

Average # jobs available to FM accredited degree program graduates

Placement rate for graduates of FM ADP Institutions

55K to 65K

Average starting salary for FM ADP undergraduate students





One Question

Why isn't this story out there?



Making FM a Career of Choice

 30 FM Degree Programs Worldwide
150+ Volunteers (Academics & FMs) FM Accreditation CHEA Accreditation
1Million Scholarship Milestone USD!!!
150K Scholarships 2013 USD
35 Scholarship Recipients 2013

15 to 500 New Volunteer Campaign

25th Anniversary Coming!



SPONSORED BY A&A MAINTENANCE Integrated facility solutions

IFMA FOUNDATION

CELEBRATION

Pennsylvania Academy Of Fine Arts

October 1^{st,} 2013 Philadelphia

6 – 9 PM

Research

NEW! Benchmarking for Facility Professionals

"How-to" Guide for FM professionals by Peter Kimmel, IFMA Fellow, Principal FM BENCHMARKING FREE download at ifmafoundation.org

COMING SOON! Workplace Strategy Summit Proceedings

Recent Publications







Benchmarking for Facility Professionals

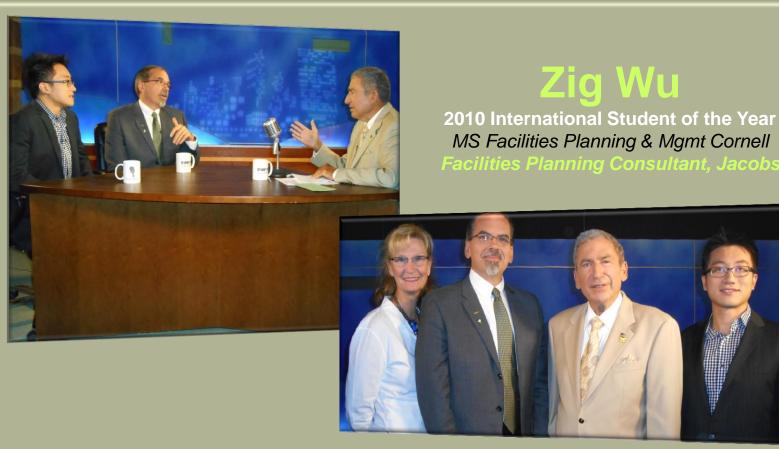




I see out of our country's top three careers, you chose Facility Manager over Doctor and Lawyer. Well played.



Telling Zig's Story



Watch Zig, Jennifer & Jeff on Straight Talk TV Show on Straighttalktv.com, YouTube, or ifmafoundation.org

One Last Question.....

How do WE togethe make FM a **CAREER OF CHOICE** and arm those Future FMs with the best education possible?





State of the Association Report

Jon Seller – Chair

James P. Whittaker, P.E., CFM, EFP, FRICS – First Vice Chair Tony Keane, CAE – President and CEO



Service Center of Excellence Relocation Debrief

And A MARG

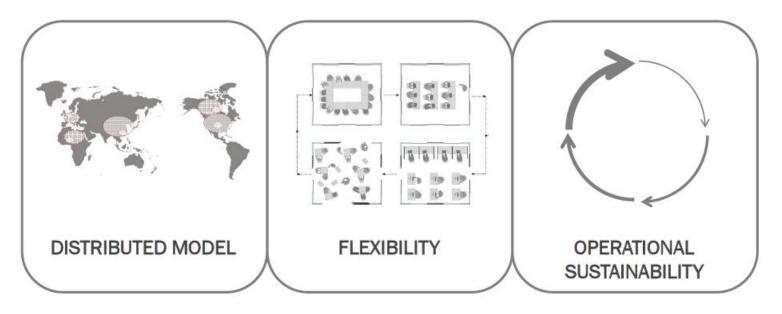
Tony Keane, CAE





IFMA's Workplace Strategy

IFMA should deliver a more effective and satisfying work environment, support a distributed service model and implement strategies for long-term flexibility and operational sustainability.



A series of standard design principles needs to be reflected in the future workplace, regardless of its location, for the project to be successful.



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DESIGN PRINCIPLES

- 1. Universal access to a variety of spaces
- 2. Visual connectivity and project-based teams

- 3. Concentrative spaces
- 4. Informal collaboration spaces
- 5. Flexibility: more multi-use space
- 6. Reduce the current footprint
- 7. Space provision that is not status based



IFMA SERVICE CENTER OF EXCELLENCE The Mobile Workplace

The journey from a headquarters to IFMA's first Service Center of Excellence

IFMA's original headquarters in Houston, Texas, USA

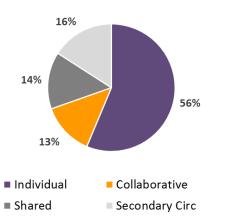
22,000 RSF*

Individual Workspace 8,847 sf (56% of total USF)

Collaborative Workspace 2,091 sf (13% of total USF)

Shared Resources 2,271 sf (14% of total USF)

Secondary Circulation 2,501 sf (16% of total USF)



TOTAL USABLE SQUARE FEET* 15,710 USF [~302 sf/person]

IFMA's first SCOE in Houston, Texas, USA

11,000 RSF*

Individual Workspace 1,042 sf (11% of total USF)

Collaborative Workspace 3,328 sf (33% of total USF)

Shared Resources 1,755 sf (18% of total USF)

Secondary Circulation 3,824 sf (38% of total USF) 33% 33% Individual Shared Shared Secondary Circ

38%

11%

TOTAL USABLE SQUARE FEET* 9,949 USF [~191 sf/person]

*50% reduction in RSF *37% reduction in USF



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OVERALL SATISFACTION

Overall, I'm satisfied with the workplace:

80% IFMA SCOE²

36% former IFMA workplace¹

59% other organizations¹



DELIVERING COLLABORATION

Ability to collaborate with colleagues effectively:



SCOE proves a collaboration efficiency **gain** of ²:

- 42% as reported by the manager
- 13% by the employee at the

Sources: 1. IFMA 2011 Employee Workplace Performance Survey 2. IFMA 2013 SCOE Post-Occupancy Survey



TECHNOLOGY: AN ENABLER FOR MOBILITY

100% mobile-ready staff

Everyone is equipped with:

- Laptop
- VPN connection
- Phone
- Contracted IT support service 24/7

Working with remote colleagues is performing well: 78% IFMA SCOE² 25% former IFMA workplace¹ 53% other organizations¹

PRODUCTIVITY

The workplace helps **me** be effective:

72% IFMA SCOE²

65% former IFMA workplace¹

56% other organizations¹



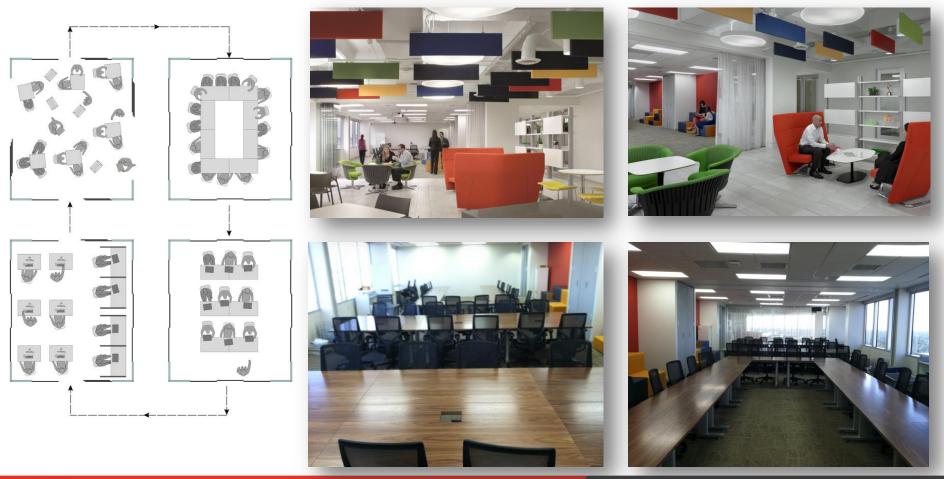
The workplace helps my team be effective: 72% IFMA SCOE² 62% former IFMA workplace¹ 54% other organizations¹



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FLEXIBILITY: MORE MULTI-USE SPACE

Designed with flexibility in mind so the space can grow, change and adapt to support organizational changes and grow with the association.





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SUSTAINABLE WORKSPACE

The Houston SCOE was conceived, designed and built around the core concepts of **sustainability**, **usability** and **productivity**:

- Half the physical footprint
- "Recycled" space where offices can be quickly and easily repurposed
- Resource-efficient furnishings, fixtures and finishes, occupancy sensors and meters
- Environmental connection with abundant **daylighting and outside views**
- Smart location with **development density** and **community connectivity**
- **Commuter friendly** utilizing mobile technology





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THANK YOU!

A big thank you goes to our board of directors for their passion, commitment and countless hours dedicated to the success of this project.

Thank you as well to the following vendors for making the first IFMA Service Center of Excellence possible:



Real Estate Brokers:



Architect/Engineering Services:





Real Estate Project Managers:



Signage & Graphics:



Workplace Relocation:



Workplace Relocation & Furniture Recycling:

Choice Furniture Source



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Research Program

Tony Keane, CAE



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Research

Research Focus

Strategic Initiative: Integrate and align FM research with industry needs, critical issues and trends



Disciplined focus on our core competencies

- 1. Benchmarking
- 2. Trending and
- 3. Forecasting



Research Committee

Kathy Roper, Georgia Institute of Technology (Chair)

Eric Teicholz, Graphic Systems

Joachim Hohmann, Technische Universitat Kaiserslautern

Isilay Civan, HOK

Adam Stoltz, CBRE

Nancy Sanquist, Manhattan Software (IFMA Foundation liaison)



Research Timeline

January 2014 – Enhancement to BEX: IFMA's Benchmarking portal

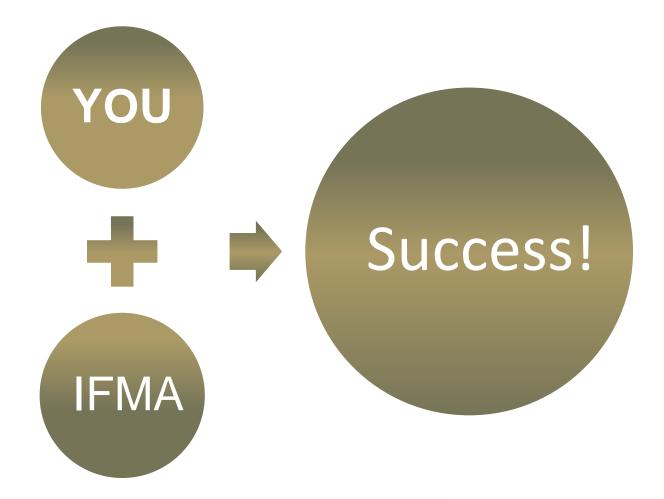
- Dynamic filtering by facility description, region, industry type, etc.
- Graphic display of data
- Customized reports
- Benchmarking YOUR building data against like facilities







Calling All Volunteers!



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Research Timeline

2014 – What Else?

Q1 –

- 2013 Trends Forum Report
- Webinar Series Launch
- 2014 Trends Forum workshop

Q2 –

- Outsourcing review
- Distributed Work Report update
- Benchmarking Executive Summary

Q3 –

- Executive review of the FM function
- 2015 Trends Forum workshop

Q4 –

- Facility Management: 2014 Year at a Glance



Your Research Team

Research Team

Cathy Pavick, VP, Professional Development

- Laverne Deckert, Product Manager, Professional Development
- Yuanyuan Zhang, Market Researcher, Professional Development

Contact us at:

research@ifma.org



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Standards Update

James P. Whittaker, P.E., CFM, EFP, FRICS

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Standards

- Late 2011: ISO Technical Management Board (TMB) established a new Technical Committee (ISO/TC 267 Facilities management)
- February 21, 2012: Stan Mitchell, Chairman of ISO TC/267, formally welcomed committee.
- BSI Secretariat proposed two CEN Standards
- **Spring 2012** IFMA/ANSI began process
- September 2012: ANSI's TAG steps to become active Pmember of ISO/TC 267
- September 2013: ANSI TAG delegation attends plenary meeting in Japan



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ANSI Tag

• Chair

Jim Whittaker, First Vice Chair, IFMA Board of Directors

Administrator

Laverne Deckert, Product Manager, Professional Development

Contact us at: ifmastandards@ifma.org



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Government Affairs

James P. Whittaker, P.E., CFM, EFP, FRICS

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IFMA Government Affairs Program Recent Success

- Established Programs in US and European Union
- Annual Public Policy Forum & Advocacy Day in US and Government Leaders Session at EFMC
- Creation and Leadership of High Performance Buildings Congressional Caucus
- Passage of Federal Buildings Personnel Training Act of 2010





Overview of Federal Buildings Personnel Training Act

- IFMA priority since 2008
- Signed into law in December 2010 requires comprehensive education, training and certification for federal facility managers
- Has shifted debate in Washington from design and construction to operations and maintenance



Overview of Federal Buildings Personnel Training Act

- Recognizes/ Validates the value of education and training and investment in certification
- Creates market for IFMA expansion
- Provides template for standardized training on international, state and local level



Essentials of Facility Management

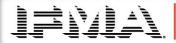
Jon Seller

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Essentials of FM Workshop Series



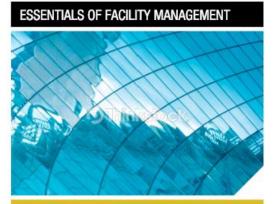
- Develop an entry-level training product to meet the educational needs of emerging FM professionals in the global FM markets. The program will be grounded in the basic concepts that describe the field of Facility Management and how it can be of value to an organization.
- The primary focus is to address the supervisor's or unit leader's role in the tactical planning for how to schedule and accomplish daily FM tasks that support the operation of an organization's facilities.



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FM Program for Emerging Markets

Essentials of Facility Management



Introduction to Facility Management Series

WORKSHOP 1

WORKSHOP 1: The Evolution of Facility Management WORKSHOP 2: Overview of the FM Competencies WORKSHOP 3: Facility Management Challenges WORKSHOP 4: The Implications of Health and Safety in Managing Buildings



ESSENTIALS OF FACILITY MANAGEMENT



Operations and Maintenance Series

WORKSHOP 1

WORKSHOP 1: The Basics of Operations and Maintenance WORKSHOP 2: The Basics of Building Systems WORKSHOP 3: The Application of Technology WORKSHOP 3: The implications of Health and Safety in Managing Buildings



ESSENTIALS OF FACILITY MANAGEMENT



Work Management in Facilities Series

WORKSHOP 1

And A. M. ARACA

WORKSHOP 1: Supervisory Roles in Facility Work Management WORKSHOP 2: Applying Work Management to Building Systems WORKSHOP 3: Work Management Tools WORKSHOP 4: Managing Contractors WORKSHOP 4: Managing and Tracking Customer Relations





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What is the EOFM Program?

- This program is comprised of a series of three training workshops aimed at conveying some of the basic needs to become (or be more effective as) a supervisor or work unit leader in the FM field. The course workshop titles are:
 - Introduction to Facility Management Series
 - Operation and Maintenance Series
 - Work Management in Facilities Series



Target Audience

- An emerging supervisor that needs to be introduced to the field of facility management and needs to understand more about supervising or managing certain aspects of the facilities of an organization.
 - Individuals who are recently in the role of providing the first level of leadership to a work unit or team that has responsibility for working with one or more aspects of the facilities of an organization.
 - Individuals who have some technical trade or office work experience and want to explore the field of facility management.
 - Individuals who are in charge of managing the contracts for facility management related services for an organization.
 - Individuals who are new to the field of facility management with little or no technical background.



Workshop Structure

- Each workshop series consists of 4-5 topical training workshops averaging about 2-6 hours of training.
- Each workshop could either be delivered in a one to two (and a half) day format or broken into modules to be delivered on different days. This would allow maximum flexibility for different markets and organizational circumstances.



Workshop Structure

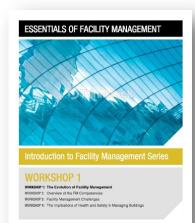
 Workshops are lecture style learning with tips, scenarios and learning activities. Each workshop contains a learning assessment at the conclusion of the class.



Introduction to Facility Management Series

And A M ARACA

- Workshop 1 The Evolution of the Facility Management Field (Currently in development with completion targeted for early 2014)
- Workshop 2 Overview of the FM Competencies (classroom completed, online completed in January 2014)
- Workshop 3 Facility Management Challenges (Scheduled for development in early 2014)







Clean Data Initiative – Chapter Reporting

And A M ARAG

 IFMA updated the way chapter data is stored in our business systems

• Allowed us to better identify which members to associate with chapters



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Clean Data Initiative

Tony Keane, CAE



Clean Data Initiative – Chapter Reporting

 Results in increased quality and accuracy of chapter rosters

 With clean data, creates groundwork for future improvements to meet needs of chapter leaders



Online Membership Join & Renew

- IFMA completely overhauled the online join and renew process to deliver a simple user focused experience
- Truly international experience, more reflective of our membership
- Simplified process requesting only what is needed



Online Membership Join & Renew

- E-Commerce best practices included
- Enhanced support for payment by check or invoice
- Planned instant delivery of electronic invoice by download, email or fax



What can I do to help?

- Inform the Member Services Team of officer and roster changes
- Work with your Chapter and Council members on maintaining updated contact records
- Remind users that the value of their membership is greatly enhanced when contact information is accurate



IFMA Rebranding/New Logo Project

Tony Keane, CAE President and CEO

Stewart Dallas Director, Marketing



Background

- Logo introduced in 1983.
- Changes could not occur because the logo was embedded in IFMA's Constitution.
- Changes to the Constitution required a balloting process whereby 25 percent of members needed to participate and two-thirds of the voting had to be YES.
- Successful campaign to amend the Constitution in 2011.
- Logo now resides in Bylaws, a document that IFMA's Board of Directors may amend as needed.
- That time has come....



Objectives and Goals for the Brand

- Reposition IFMA as the preeminent membership organization for FM professionals and those individuals & organizations providing services.
- Position IFMA as key component of professional development.
- Be recognized as the premiere global organization providing facility-related research, benchmarking, publications, peer-to-peer networking and career-advancement tools.



Project Schedule and Milestones

- RFP Process to select Agency. May Sep 2012
- Information gathering & project planning. October 2012
- Extensive Market research. November 2012-March 2013
- Creative Brief Framework and Foundation for Creative approach March 2013
- Brand positioning and concept. April Sep 2013
- Development and refinement of the "Family Look" our components, councils, chapters, Foundation, Alliance, etc. August /Sep 2013
- Extra Member research in final logo and tagline choices August /Sep 2013
- Approval of new Logo at WWP 2013. October 2013
- Brand Architecture Refinements for Chapters and Councils. October 2013
- Brand Usage Guide how we use the new look and when. October 2013
- Brand Book a document that will help us all be brand champions moving forward. October/Nov 2013
- Rollout with all Chapters, Councils and other Components. October 2013 into 2014



Research Methodology

- Staff Intake Sessions talked to all staff in Houston – offered a lot of great info!
- Member Focus Groups At World Workplace; Good for Neiger Design, became immersed in our environment.
- Telephone Interviews with Foundation, Council, Chapter, Members and other key parties.
- Quantitative Research Survey.
- Post Design Research of Final Choices.



Results of Research

- Overwhelming consensus that IFMA brand needs renewal!
- Comments about the current logo:
- "It does not reflect the potential of the organization."
 "IFMA wants to be a leader in the field, this logo does not say that."
 - "It does not say anything about our brand."
 - "It looks dated/old fashioned."



Results of Research

- **Brand qualities.** "Which adjectives describe your vision for IFMA of the future?" produced results weighing heavily on education/innovation, thought leadership, collaboration and global (international Focus).
- Elevate Facility Management. Intake Sessions and Focus Groups emphasized the importance of elevating the perception of Facility Management to reflect the current reality of the profession. "We should have a seat at the executive table."



Results of Research

- Member suggestions for the rebrand. A global connection. Symbolize diversity. Desire for more sophistication with an eye to the future, the triple bottom line (People, Planet, Profit) as a winning image and incorporate the sustainability message that is appealing to younger people.
- Color. Red, green and blue represented over 80% of the answers to "what color best reflects IFMA's personality." 1) Red was the top answer, citing "bold" and "powerful." 2) Green was the second most common answer, citing its association with "sustainability." 3) Blue was third with no single reason cited.

Post Design Work - Final Logo Choice Research

 A final wave of research to validate and get "Final" Voice of customer.

- Carried out on Final Logo Choice in August.
- There was a clear winner.
- Online Survey Almost 8 in 10 respondents picked out what will become our new logo as their number 1 or number 2 choice out of 7 logos!









Empowering Facility Professionals Worldwide





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And A MARA





And All JA





And All JR.





Empowering Facility Professionals Worldwide

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Phone: +1-713-623-4362 Fax: +1-713-623-6124

www.ifma.org



Next Steps

- Approve the logo.
- Roll out internally at IFMA.
- Roll out plan with Chapters and Councils, Foundation, other components.
- Support Components as much as possible.
- Produce Brand Usage Guide.
- Produce Brand Book for Staff and Send info to Members.





Empowering Facility Professionals Worldwide



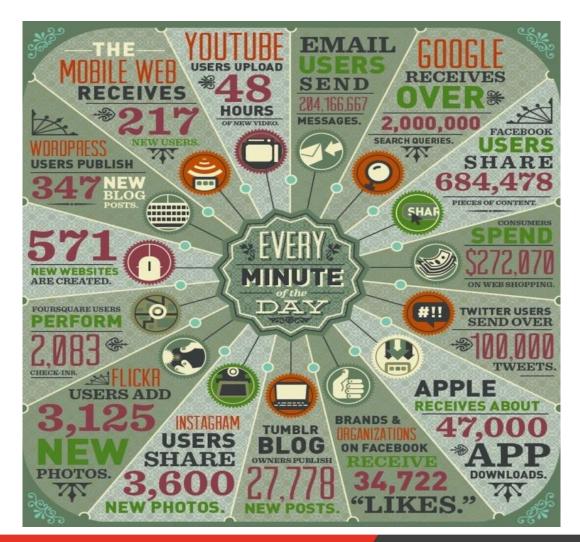
Knowledge Management Strategy

Kevin O'Toole, CFM, NCARB – Chair, Knowledge Management Task Force

Andrea E. Sanchez – Director, Communications and Editor-in-Chief, *FMJ*



Data Never Sleeps

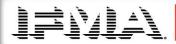




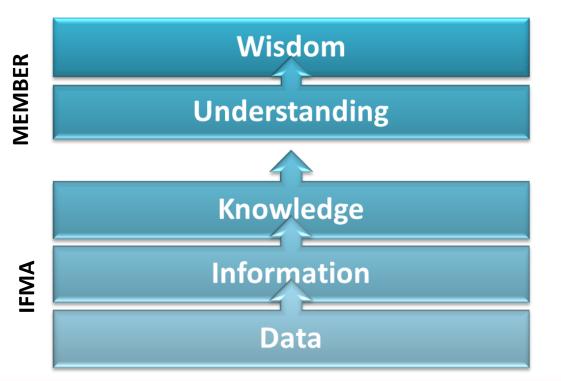
What is Knowledge Strategy?

Knowledge Strategy is aligning information to a defined purpose:

Continuously position IFMA as the global FM thought leader to guide and develop the growth of our members to advance the FM profession.



Continuously position IFMA as the global FM thought leader to guide and develop the growth of our members to advance the FM profession.



"We're drowning in information and starving for knowledge."

-Rutherford D. Rogers



Knowledge

• A process of applying data and structured information, linking ideas, answers "how"



Information

 Data that has been organized into meaning, answers "who, what, where, when"



Data

• Raw, without context, on its own not significant





Wisdom

 Achieving goals and adding value based on understanding

And A H . A.



Understanding

• Applying knowledge, answers "why"



IFMA Balanced Scorecard

And A MAR

Vision: Serve as the resource and representative for facility management. Mission: Advance the facility management profession.

Strategic Objectives	Initiatives
1. Continuously improve opportunities to expand and leverage stakeholders' collective knowledge and experience.	1A. Continue to enhance IFMA's global opportunities to engage stakeholders.
2. Provide essentials for facility management professionals to advance their careers.	2B. Maximize value of IFMA professional development.
3. Magnify the importance of facility management worldwide.	3E. Take a leadership role in creating FM standards.
4. Deliver exceptional value to stakeholders.	4A. Evaluate and enhance the value that IFMA provides for membership.
5. Foster a culture that instills innovation, passion, challenge and meaning among stakeholders.	5B. Position IFMA as the go to organization for FM industry volunteers.



Stakeholder Engagement





Continuously position IFMA as the global FM thought leader to guide and develop the growth of our members to advance the FM profession.

Knowledge Management Strategy Impacts:

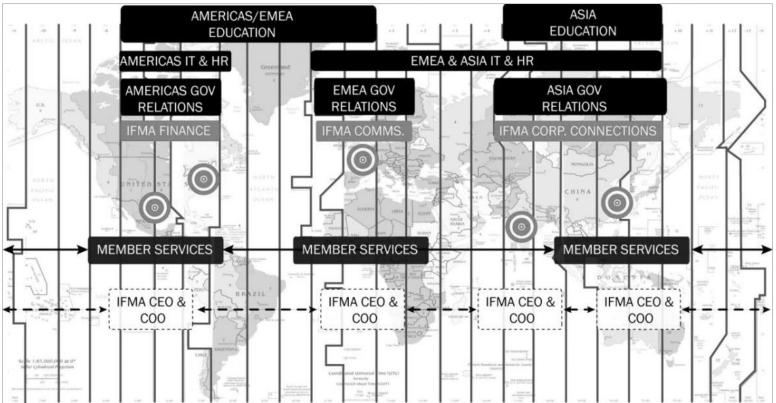
- Credentials
- Education
- > Research
- > Standards
- Components
- Publications

- Events
- > Website
- Communication
- Member service delivery
- Brand strength
- Culture



Service Centers of Excellence Alignment

Our Products and Services must have Corporate and Regional Responsiveness



Entire IFMA Community: Chapters, Councils, Communities of Practice



FM Knowledge Strategy



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By putting this strategy in place we will:

- Allow our members to grow and be ahead of the competition;
- Enable collaboration within IFMA as a service center of excellence;
- Reduce the cost of ignorance;
- Transfer knowledge to next generation;
- Eliminate borders in a global environment;
- Enhance market responsiveness; and
- Improve productivity and efficiency.



Comments from the floor



Adjournment